

New Hire Action

PA40

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
11/1/04	Marie Dunlap	Per SIR 499, Personal Holiday quota creation upon hire – referenced Maintain Quota Balance script.
11/15/04	Emilie Miller	Edit 1
4/15/05	Kathy Henry	Added notes to Bank Detail field descriptions and to General Benefits entry. Incorporated some new standards.
7/20/05	Kathy Henry	Removed highlighting on changed text; added boilerplate text for messages; This procedure incorporates the entire hire flow.
11/16/05	Chyllynn Hansel	Edits
12/13/05	Chyllynn Hansel	Edits
5/3/06	Chyllynn Hansel	Edits
6/12/06	Chyllynn Hansel	Edits
7/7/06	Chyllynn Hansel	Edits
7/17/06	Chyllynn Hansel	Edits
8/11/06	Lesa Terry	Update Bank Details information
9/6/06	Lesa Terry	Update Tax exemption information

Purpose

Use this procedure to hire a new employee or rehire a former state employee who was not converted into HRMS.

Trigger

Perform this procedure when a new employee or former state employee, who was not converted, into HRMS is being entered into HRMS for the first time.

Prerequisites

- An employee must have been hired into State service and completed a New Hire Information Packet.

Menu Path










- Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions

Transaction Code

PA40

Helpful Hints

- Personal Holiday quotas are only created by the system at the beginning of a year. Employees who are hired after the beginning of the year and are entitled to a Personal Holiday will need to have their quota entered manually. See OLQR procedure [Quota Accrual Generate Manually](#) to lead you through this process.
- If you are hiring a former employee that has not been converted in to HRMS, contact the HRISD helpdesk at 360-664-6400 or helpdesk@dop.wa.gov to get the employee's personnel ID number out of the data warehouse.
- This procedure may require hand-offs to other roles (payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency.
- It is critical if a hand-off is made to another role, that the transaction code **PA40** is used and the "execute into infogroup" process is used. This is explained further in this procedure. Using **PA40** will ensure that all required infotypes are completed.
- Do not use transaction code **PA30** to complete portions of the appointment change action.
- The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. You have started the transaction using the menu path or transaction code **PA40**.


Personnel Actions

The screenshot displays the SAP Personnel Actions (PA40) transaction. The top menu bar includes 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The left sidebar shows a 'Find by' section with options: 'Person', 'Collective search help', 'Search term', and 'Free search'. The main area features a table titled 'Personnel Actions' with the following columns: 'Action Type', 'Personn...', 'EE group', and 'EE subg...'. The table lists various personnel actions, including 'New Hire', 'Change of Status', 'Concurrent Employment', 'Appointment Change', 'Separation', 'Rehire', 'Paid Leave of Absence', 'Unpaid Leave of Absence', 'Return from Leave of Absence', 'Release 2 to 1 New Hire/Tmnsfr', 'Release 1 to 2 Sep/Tmnsfr', and 'Conversion Correction'. The bottom status bar indicates '201 ssvaphrdedci INS'.


2. Perform one of the following:

If	Go To
You are the Personnel Administration Processor	Step 3
You are the Payroll Processor	Step 57
You are the Benefits Processor	Step 79

3. Complete the following field:

Field Name	R/O/C	Description
From	R	<p>The effective date of the new hire appointment.</p> <p> Only enter the <i>From</i> date if you are the Personnel Processor initiating the appointment change action.</p> <p>Example: 6/4/2006</p>



















4. Click the gray box to the left of New Hire to select.

5. Click  (Enter) to validate the information





6. Click  (Execute).

Create Actions

Infotype Edit Goto Extras System Help



Create Actions (0000)

 Change info group

Pers.No.

Start to

Personnel action

Action Type

Reason for Action ☒

Reference pers. no.

Status

Employment

Organizational assignment

Position ☒





Personnel area

Employee group

Employee subgroup


Additional actions

Start Date	Act.	Action type	ActR	Reason for acti

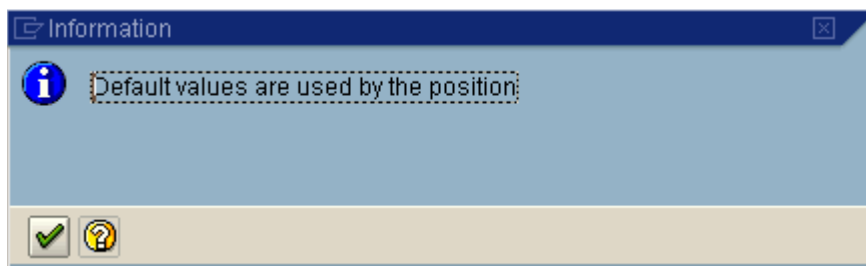


7. Complete the following fields:


Field Name	R/O/C	Description
Reason for Action	R	The reason that an action has been performed. Example: 02
Position	R	The position number. Example: 60000117

8. Click  to validate the information.

Information



9. Click  to accept.

10. Click  to validate the information.



The employee's personnel number will now be generated.

Create Actions

Create Actions (0000)

Change info group

Pers.No. 20001064

Start 06/04/2006 to 12/31/9999

Personnel action

Action Type New Hire

Reason for Action 02 Probationary Appointment

Reference pers. no.

Status

Employment Active

Organizational assignment

Position 60004597 HR Consult

Personnel area 1110 Dept of Personnel

Employee group 0 Permanent

Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action type	ActR	Reason for acti

Save your entries

11. Click  to save.

Create Personal Data

Create Personal Data (0002)

Personnel No.

Start To Status

Name

Title

Last name ☒

First name

Middle name

Suffix

Known As

Name

HR data

SSN ☒

Date of Birth ☒

Marital status ☒

Gender ☒ Female ☐ Male

Since

12. Complete the following fields:


Field Name	R/O/C	Description
Last name	R	The legal last name of an employee as indicated on the social security card. Example: Smith
First name	O	The legal first name of an employee as indicated on the social security card. Example: Sally

Title: *New Hire Action*
Processes :
Sub-Processes :

HRMS Training Documents

Field Name	R/O/C	Description
SSN	R	A 9 digit number assigned by the Social Security Administration. Example: 432567877
Date of Birth	R	The basic value used to calculate a person's age. Example: 05/25/1943
Marital status	R	The marital status of the employee, i.e. single, married, divorced, etc. Example: Single

13. In the Gender field, click ☐ Male or ☒ Female .

14. Click  to validate the information.



The start date on the *Create Personal Data* (0002) infotype will be the employee's birthday.

Create Personal Data (0002)

Create Personal Data (0002)

Personnel No. 20001064

Status Active

Start 05/25/1943 To 12/31/9999

Name

Title

Last name Smith

First name Sallie

Middle name S

Known As

Suffix

Name Smith Sallie S

HR data

SSN 432-56-7877

Date of Birth 05/25/1943

Gender ☒ Female ☐ Male

Marital status Single

Since

15. Click  to save.

Create Organizational Assignment

Create Organizational Assignment (0001)

Personnel No. Status

Start to

Enterprise structure

CoCode	<input type="text" value="WA01"/>	STATE OF WASHINGTON		
Pers.area	<input type="text" value="1110"/>	Dept of Personnel	Subarea	<input type="text" value="0001"/> Non Represented
Cost Ctr	<input type="text" value="1110000000"/>	MISSING_DEFAULT...	Bus. Area	<input type="text" value="1110"/> Department of Personnel
			Fund	<input type="text"/>

Personnel structure

EE group	<input type="text" value="0"/>	Permanent	Payr.area	<input type="text" value="11"/> Semi-monthly
EE subgroup	<input type="text" value="01"/>	Monthly(M) OT Exempt	Contract	<input type="text"/>

Organizational plan

Percentage	<input type="text" value="100.00"/>	Assignment
Position	<input type="text" value="60004597"/>	3058 HR Consult
Job key	<input type="text" value="60004449"/>	1008 HR Worker
Exempt	<input type="checkbox"/>	
Org. Unit	<input type="text" value="60004465"/>	2002 HR
Org.key	<input type="text"/>	

Administrator

PersAdmin	<input type="text"/>
Time	<input type="text"/>
PayrAdmin	<input type="text"/>

16. Complete the following field:


Field Name	R/O/C	Description
Contract	R	The employee's state status. Example: Probation

State of Washington HRMS

Title: New Hire Action
Processes :
Sub-Processes :

HRMS Training Documents

Field Name	R/O/C	Description
Org. key	O	The pay distribution location. Example: 4000
Time	O	The time data administrator is responsible for the employees assigned to him or her. Example: DA

17. Click  (Enter) to validate the information.

Organizational Assignment (0001)

Infotype Edit Goto Extras System Help

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Create Organizational Assignment (0001)

📄 📂 📍 Org Structure

Personnel No. 20001064

Status Active

Start 06/04/2006 ➡ to 12/31/9999

Enterprise structure

CoCode	WA01	STATE OF WASHINGTON		
Pers.area	1110	Dept of Personnel	Subarea	0001 Non Represented
Cost Ctr	1110000000	MISSING_DEFAULT...	Bus. Area	1110 Department of Personnel
			Fund	

Personnel structure

EE group	0	Permanent	Payr.area	11 Semi-monthly
EE subgroup	01	Monthly(M) OT Exempt	Contract	Probation 📄

Organizational plan

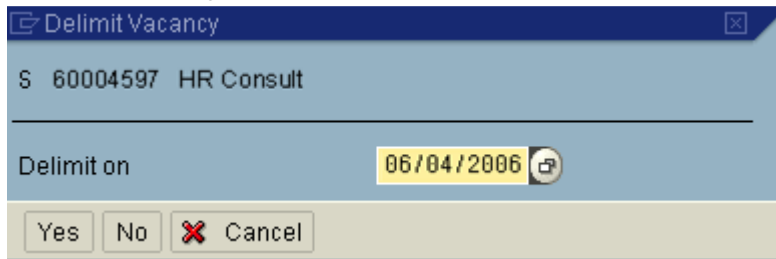
Percentage	100.00		📄 Assignment
Position	60004597	3058	
		HR Consult	
Job key	60004449	1008	
		HR Worker	
Exempt			
Org. Unit	60004465	2002	
		HR	
Org.key			

Administrator

PersAdmin	
Time	
PayrAdmin	

18. Click  (Save) to save.

Delimit Vacancy



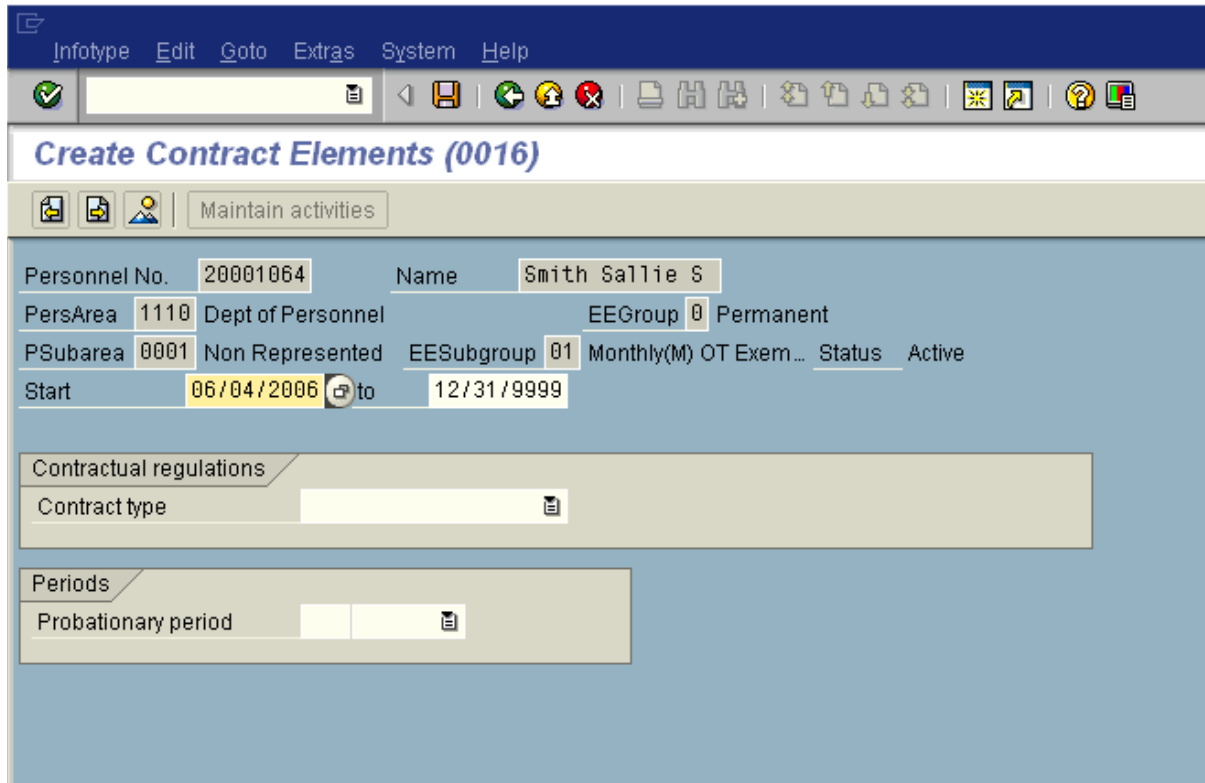
A dialog box titled "Delimit Vacancy" with a close button in the top right corner. The main area contains the text "S 60004597 HR Consult". Below this, there is a label "Delimit on" followed by a date field containing "06/04/2006" and a calendar icon. At the bottom, there are three buttons: "Yes", "No", and "Cancel" (with a red X icon).



This screen will only appear if there is a vacancy that will be delimited by the new hire.

19. Click **Yes** to delimit the vacancy.


Create Contract Elements



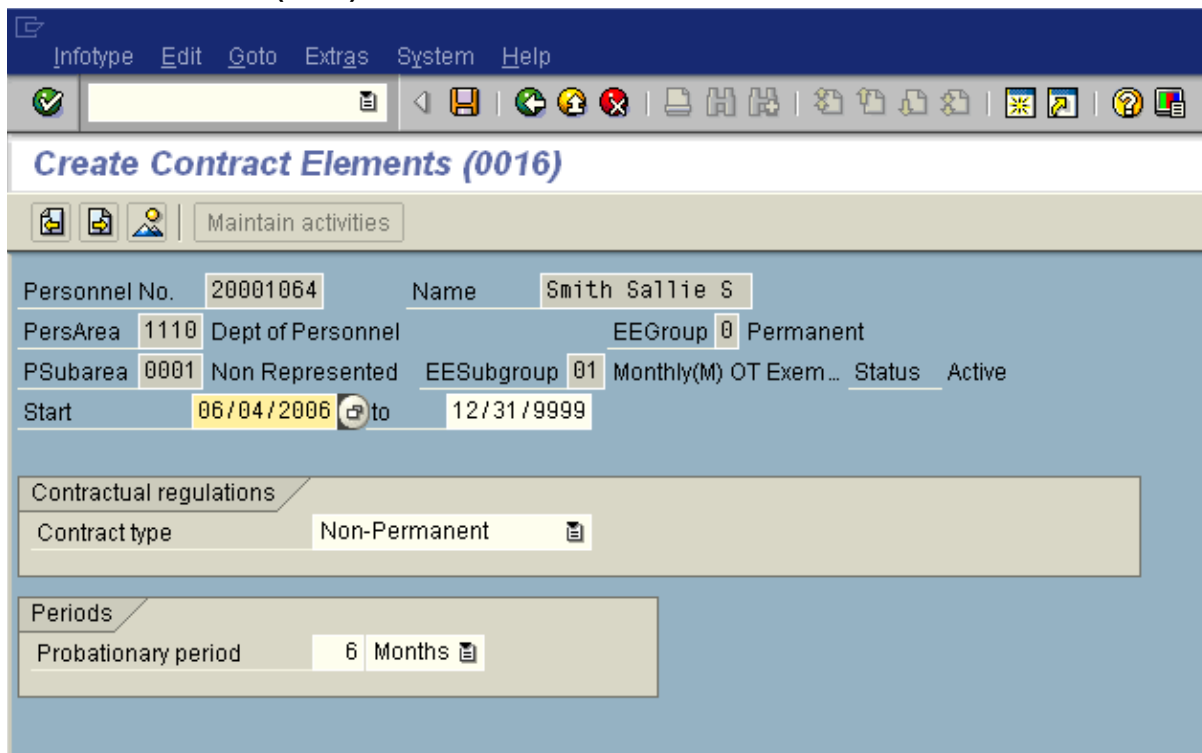
A screenshot of the "Create Contract Elements (0016)" screen. The window has a menu bar with "Infotype", "Edit", "Goto", "Extras", "System", and "Help". Below the menu is a toolbar with various icons. The main area is titled "Create Contract Elements (0016)" and contains a "Maintain activities" button. Below this, there are several data entry fields: "Personnel No." (20001064), "Name" (Smith Sallie S), "PersArea" (1110), "Dept of Personnel", "EEGroup" (0), "Permanent", "PSubarea" (0001), "Non Represented", "EESubgroup" (01), "Monthly(M) OT Exem...", "Status" (Active), "Start" (06/04/2006), and "to" (12/31/9999). Below these fields, there is a section for "Contractual regulations" with a "Contract type" field. At the bottom, there is a section for "Periods" with a "Probationary period" field.

20. Complete the following fields:

Field Name	R/O/C	Description
Contract type	R	The status of employment within the State. It will be either Permanent or Non-permanent. Example: Non-Permanent
Probationary period	O	The length of employee's probationary period. Example: 6 Months

21. Click  (Enter) to validate the information.

Contract Elements (0016)



22. Click  (Save) to save.

Create Monitoring of Tasks

Create Monitoring of Tasks (0019)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Task

Task Type Prob per to expire

Date of Task 12/04/2006 Processing indicator New task


Reminder

Reminder Date

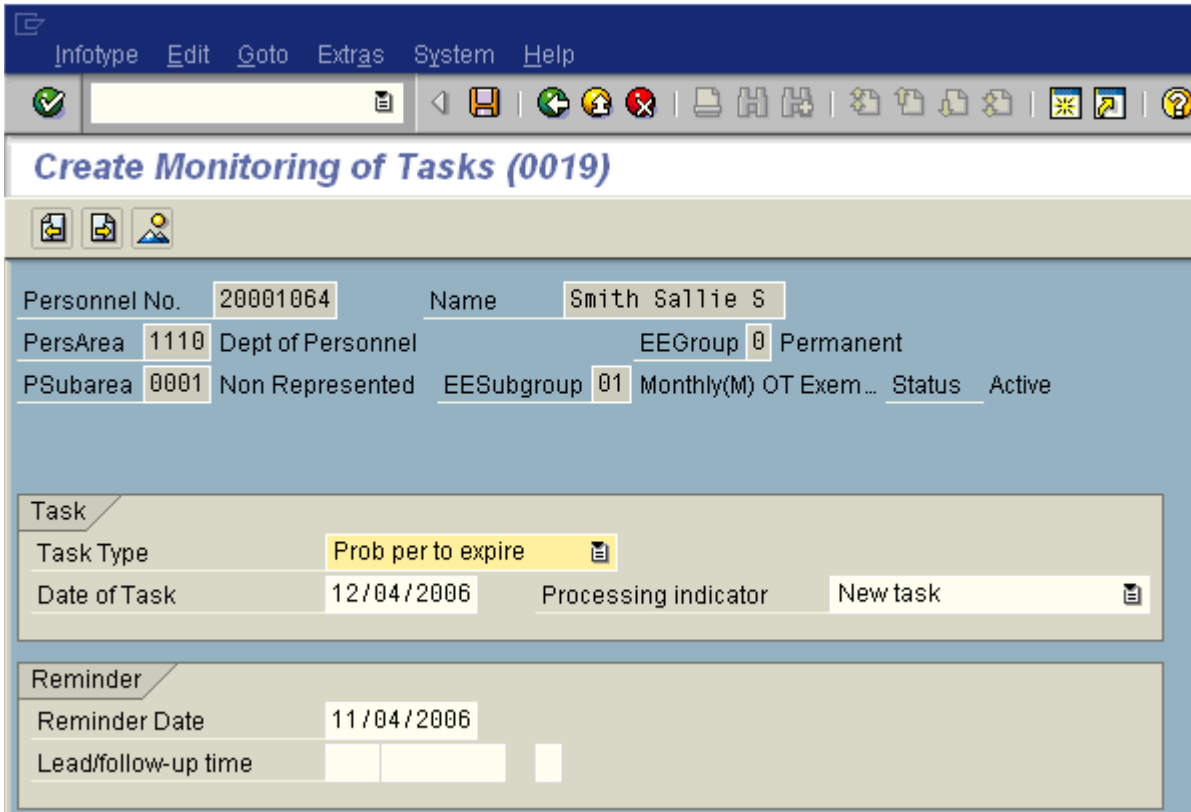
Lead/follow-up time

23. Complete the following fields:


Field Name	R/O/C	Description
Task Type	O	A task type is a relevant task that an HRMS user would be expected to perform. Example: Prob per to expire
Date of Task	O	The date on which the task needs to be completed. Example: 01/25/2005
Processing indicator	O	This is used to signify if a task entered in the Monitoring of Tasks infotype is new, in process, or has been completed. Example: New task
Reminder Date	O	The date on which the system should remind you of a certain task. Example: 6/1/2005
Lead/follow-up time	O	The lead/follow-up time defines a period before or after which the system should remind you of a certain task. Example: 1 month

24. Click  (Enter) to validate the information.

Monitoring of Task (0019)






























You can run the monitoring of task report, transaction code **S_PH0_48000450** to get the reminder tasks and dates.




25. Click  (Save) to save.

Create Addresses

InfotypeEditGotoExtrasSystemHelp



Create Addresses (0006)



Foreign address

Personnel No.20001064NameSmith Sallie S

PersArea1110Dept of PersonnelEEGroup0Permanent

PSubarea0001Non RepresentedEESubgroup01Monthly(M) OT Exem...StatusActive

Start06/04/2006to12/31/9999

Address

Address typePermanent residence

Street/House no.☒

2nd address line

Postal code / city☒☒

Country KeyUSA

Office/region☒

County code☒

Telephone number

Communication



Communication 1


Communication 2

Communication 3


Communication 4




























26. Complete the following fields:

Field Name	R/O/C	Description
Address type	R	<p>The type of address for this infotype</p> <p>Example: Permanent residence</p> <p> You can also select mailing address from the drop down list. If the employee provides a permanent residence and mailing address you can only complete one type during the New Hire Action. To enter another address type follow the procedure Addresses Create and Maintain that is located in the OLQR.</p>
Street/House no.	R	<p>The residential street address of an employee.</p> <p>Example: 123 Elm Lane</p>
Postal code / city	R	<p>The 5 or 9 digit zip code and city the employee resides in.</p> <p>Example: 98498/Lakewood</p>
Country Key	R	<p>The county the employee resides in.</p> <p> This will default in as USA.</p> <p>Example: USA</p>
Office/region	R	<p>The State in which the employee resides.</p> <p>Example: WA</p>
County code	R	<p>The code for the county in which the employee resides.</p> <p>Example: 27</p>
Telephone number	O	<p>The home phone number of an employee.</p> <p>Example: (253)555-5555</p>




27. Click  (Enter) to validate the information.

Addresses (0006)

 Infotype Edit Goto Extras System Help



Create Addresses (0006)

 Foreign address


Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Active
Start	06/04/2006	to	12/31/9999

Address

Address type	Permanent residence		
Street/House no.	123 Elm Lane		
2nd address line			
Postal code / city	98498	Lakewood	
Country Key	USA		
Office/region	WA	Washington	
County code	27	Pierce County	
Telephone number	(253) 555-5555		

Communication

Communication 1		
Communication 2		
Communication 3		
Communication 4		

28. Click  (Save) to save.

Create Planned Working Time

Create Planned Working Time (0007)

Work schedule

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 To 12/31/9999

Work schedule rule

Work schedule rule FULL

Time Mgmt status 9 - Time evaluation of planned times

☐ Part-time employee Additional time ID

Working time

Employment percent 100.00 ☐ Dyn. daily work schedule

Daily working hours Min. Max.

Weekly working hours 0.00 Min. Max.

Monthly working hrs 0.00 Min. Max.

Annual working hours 0.00 Min. Max.

Weekly workdays


29. Complete the following fields:

Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. Example: FULL
Time Mgmt status	R	The part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. Example: 9 – Time evaluation of planned times

Title: New Hire Action
Processes :
Sub-Processes :

HRMS Training Documents

Field Name	R/O/C	Description
Additional time ID	C	The indicator on how employee leave will accrue Enter: <ul style="list-style-type: none">▪ 00 for full normal leave accrual (will default if to normal if field is left blank).▪ 01 for NO leave accrual▪ 02 for sick leave accrual only
Employment percent	O	The amount of time that an employee works per week in a particular position and is described in terms of a percentage. Example: 100.00

30. Click  (Enter) to validate the information.

Planned Working Time (0007)

Infotype Edit Goto Extras System Help

Create Planned Working Time (0007)

Work schedule

Personnel No.	20001064	Name	Smith Sallie S	
PersArea	1110	Dept of Personnel	EESubgroup	0 Permanent
PSubarea	0001	Non Represented	EESubgroup	01 Monthly(M) OT Exem... Status Active
Start	06/04/2006	To	12/31/9999	

Work schedule rule

Work schedule rule	FULL	5-8s: M-F 8 hpd
Time Mgmt status	9 - Time evaluation of planned times	
<input type="checkbox"/> Part-time employee	Additional time ID	00

Working time

Employment percent	100.00	<input type="checkbox"/> Dyn. daily work schedule	
Daily working hours	8.00	Min.	Max.
Weekly working hours	40.00	Min.	Max.
Monthly working hrs	174.00	Min.	Max.
Annual working hours	2080.00	Min.	Max.
Weekly workdays	5.00		

31. Click (Save) to save.

Subtypes for infotype "Education" (1) 11 Entries Found

Subtypes for infotype "Education" (1) 11 Entries Found

Restrictions

✓ ✕ H H+ * ? P

EE	Educ. est. text
01	High School or GED
02	Voc School w/o HS
03	Voc. or Bus. School
04	Some College-2Qtrs+
05	AA Degree
06	Col Grad 4 Yr Degree
07	Some Grad Work
08	MA/MS/MSW Degree
09	Other Master Degree
10	PHD, LLD, MD, JD
11	Less Than HS Grad

11 Entries Found

32. Double-click the employee's highest education level.

Create Education

Create Education (0022)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start to

Educational est. 06 Col Grad 4 Yr Degree

Education/training


Institute/location

Country Key USA

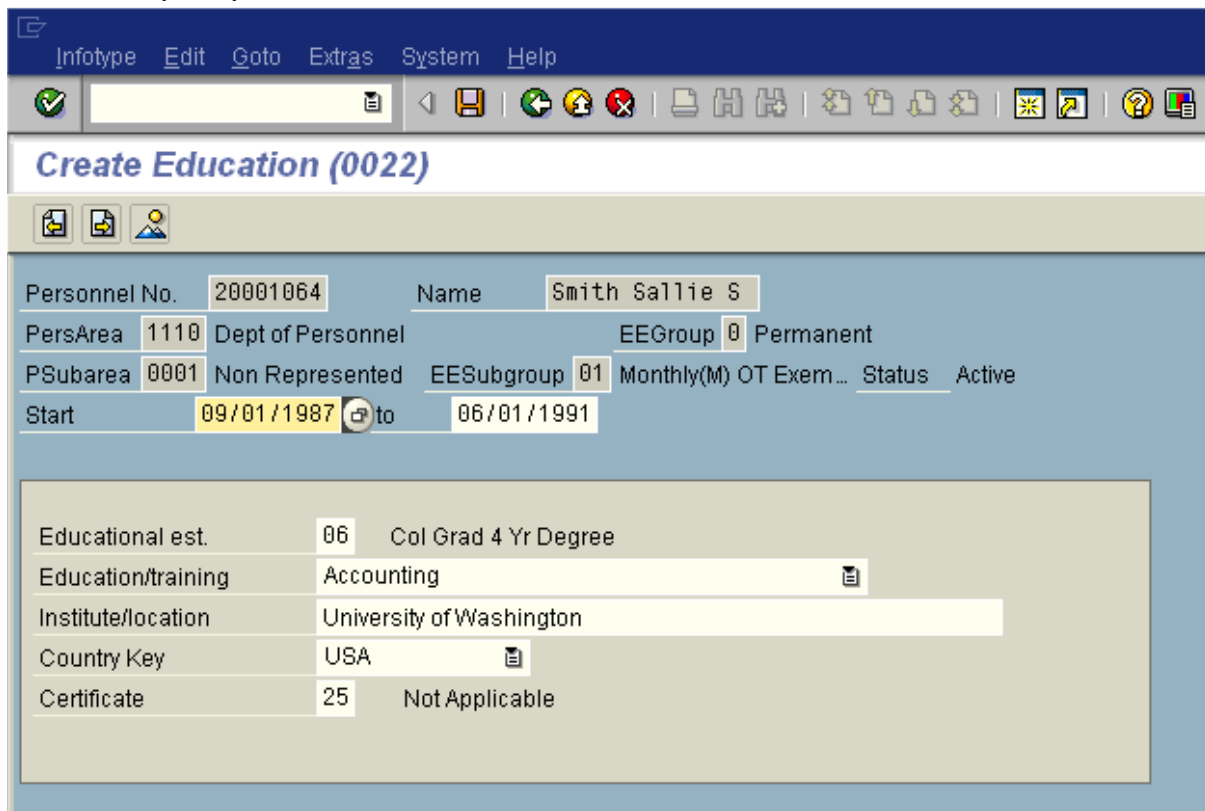
Certificate

33. Complete the following fields:

Field Name	R/O/C	Description
Start	R	The date on which a record begins. Example: 09/01/1987
to	R	The end date of a record, transaction, or search. Example: 06/30/1991
Education/training	O	The type of education and/or training the employee/applicant has acquired at a given educational institution. Example: Accounting
Institute/location	O	The name of educational institution attended. Example: University of Washington
Certificate	R	The type of leaving certificate (e.g. high school diploma, university degree) the employee or applicant has acquired at a given institution. Example: 25

34. Click  (Enter) to validate the information.

Education (0022)



Create Education (0022)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 09/01/1987 to 06/01/1991

Educational est. 06 Col Grad 4 Yr Degree

Education/training Accounting

Institute/location University of Washington

Country Key USA

Certificate 25 Not Applicable

35. Click  (Save) to save.

Change Date Specifications

Date type	Date	Date type	Date
01 Anniversary Date	06/04/2006	02 Appointment Date	06/04/2006
03 Original Hire Date	06/04/2006	05 Seniority Date	06/04/2006
07 Unbroken Svc. Date	06/04/2006	18 Prsnl HolidayElgblty	06/04/2006



The date types for Anniversary Date, Appointment Date, Original Hire Date, Seniority Date, Unbroken Service Date and Personal Holiday Eligibility will default in to the new hire date.

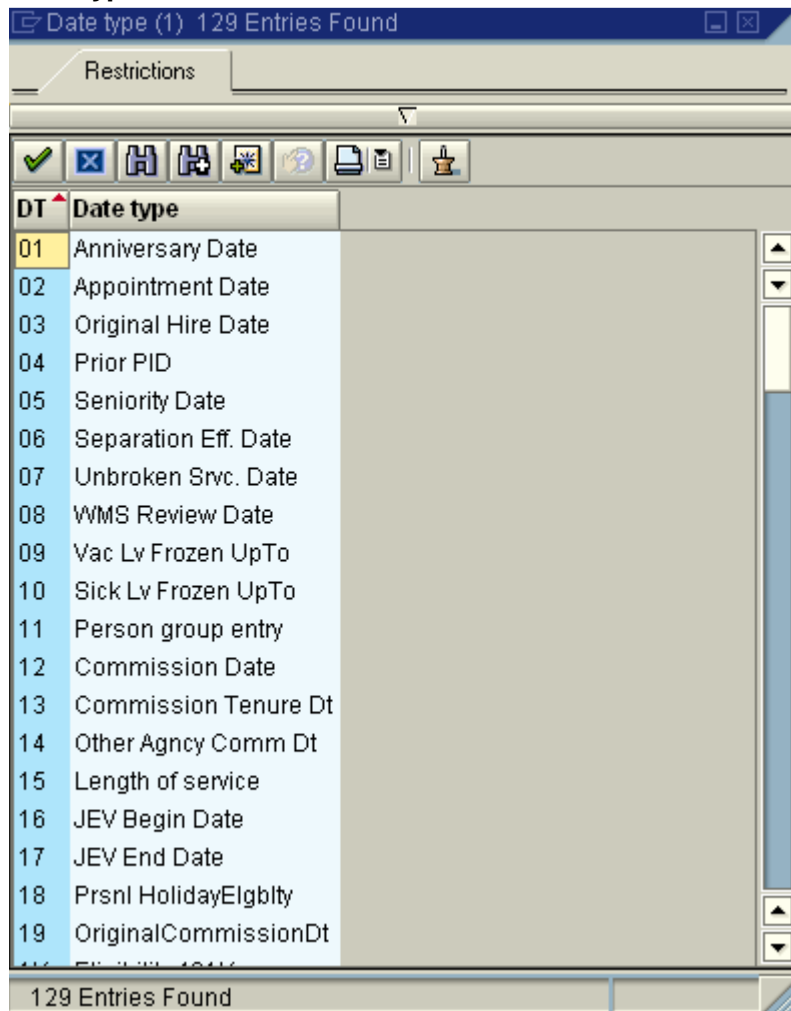
- The *Prsnl Holiday/Elgblty* (Personal Holiday Eligibility) is the date an employee is eligible to take a personal holiday.
 - The *Prsnl Holiday/Elgblty* will default to the new hire date. If the employee is not eligible to take a personnel holiday when they start employment, you will need to change the date to when they are eligible.
- In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

36. Create the date type for *Vac Lv Frozen Up To*.

This is the date the employee will be eligible to take vacation leave. It is date type 09.

37. Click in the Date type field to select the match code.

Date type



38. Double click **09 Vac Lv Frozen UpTo**.

Date Specifications

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent


PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999 Chng 06/13/2006 CHYLYNNH

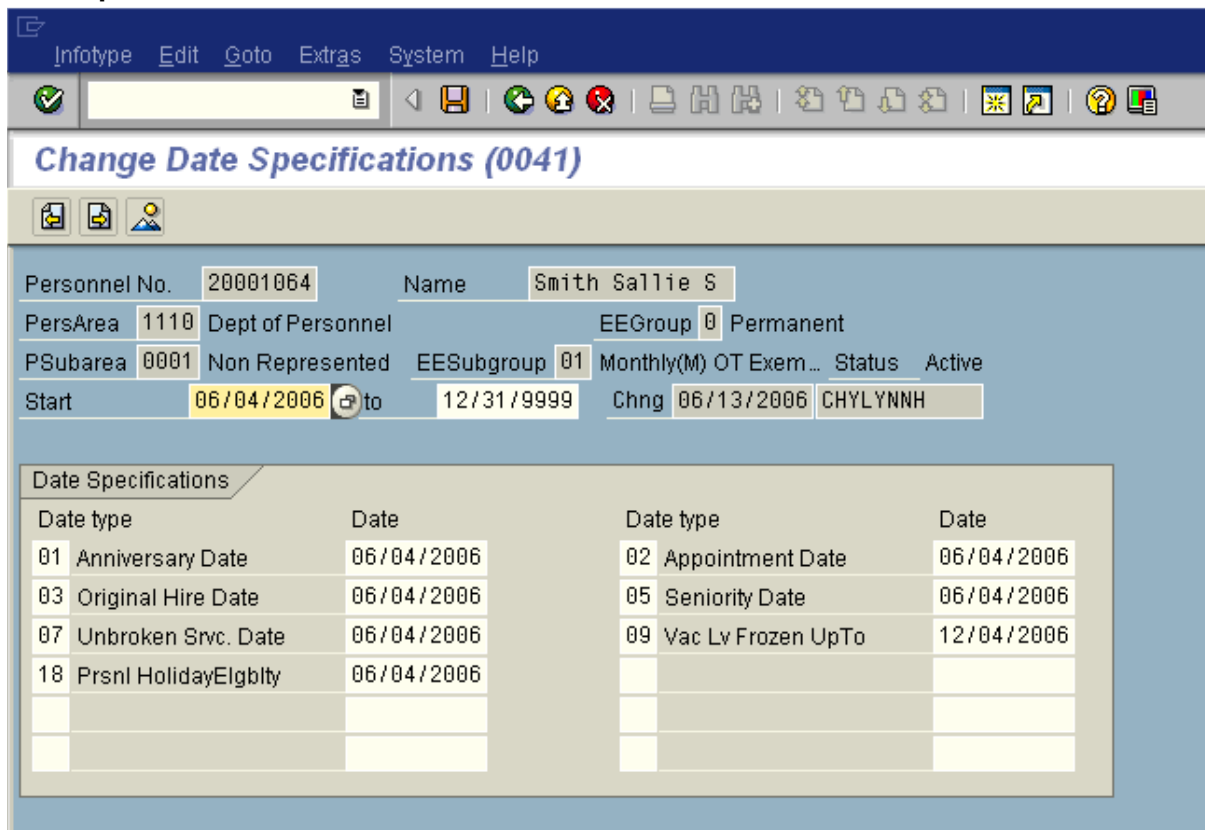
Date type	Date	Date type	Date
01 Anniversary Date	06/04/2006	02 Appointment Date	06/04/2006
03 Original Hire Date	06/04/2006	05 Seniority Date	06/04/2006
07 Unbroken Svc. Date	06/04/2006	18 Prsnl HolidayElgblty	06/04/2006
09			

39. In the date field enter the date the employee will be eligible to use vacation leave.

Example: 12/04/2006

40. Click  (Enter) to validate the information.

Date Specifications



Change Date Specifications (0041)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

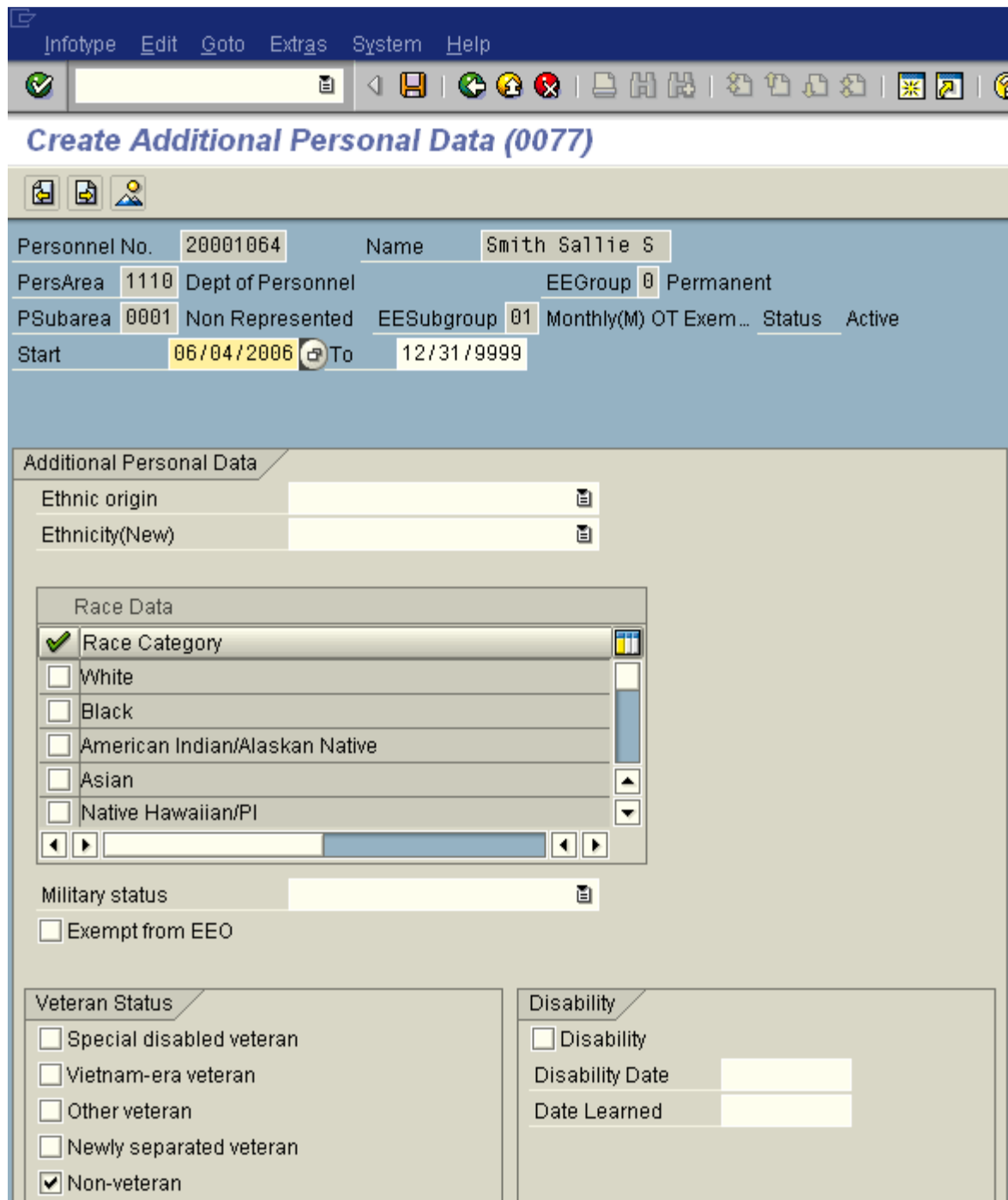
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999 Chng 06/13/2006 CHYLYNNH

Date Specifications			
Date type	Date	Date type	Date
01 Anniversary Date	06/04/2006	02 Appointment Date	06/04/2006
03 Original Hire Date	06/04/2006	05 Seniority Date	06/04/2006
07 Unbroken Svc. Date	06/04/2006	09 Vac Lv Frozen UpTo	12/04/2006
18 Prsnl HolidayElgblty	06/04/2006		

41. Click  (Save) to save.

Create Additional Personal Data



Infotype Edit Goto Extras System Help

Create Additional Personal Data (0077)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 To 12/31/9999

Additional Personal Data

Ethnic origin

Ethnicity(New)

Race Data

☒ Race Category

☐ White

☐ Black

☐ American Indian/Alaskan Native

☐ Asian

☐ Native Hawaiian/PI

Military status

☐ Exempt from EEO

Veteran Status

☐ Special disabled veteran

☐ Vietnam-era veteran

☐ Other veteran

☐ Newly separated veteran

☒ Non-veteran


Disability

☐ Disability

Disability Date

Date Learned

42. Complete the following fields:

Field Name	R/O/C	Description
Ethnic origin	<input type="radio"/>	The employee's ethnic group. It is used in countries which require this type of reporting by law. Example: Black
Ethnicity(New)	<input type="radio"/>	The EEO coded field allows you to group employees by ethnic origin. It is used in countries which require this type of reporting by law. Example: Not Hispanic/Latino
Military status	<input type="radio"/>	The branch of service the employee served/serves in.  If the employee has not served in the military you can select Non/Unspec Vet's Status or leave the field blank. Example: Rtrd VtnmVt > 500


43. In the **Race Data** group, click the checkbox to the left of appropriate **Race Category** to select.

44. If applicable, choose a **Veteran Status**.



Non-Veteran is the default **Veteran Status**, if you select another **Veteran Status**, then you must uncheck the Non-Veteran status.

45. If applicable, choose a **Disability**.

46. Click  (Enter) to validate the information.

Create Additional Personal Data

The screenshot shows the SAP 'Create Additional Personal Data (0077)' form. At the top is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main form area has a title bar 'Create Additional Personal Data (0077)'. The form contains several input fields for personnel data: 'Personnel No.' (20001064), 'Name' (Smith Sallie S), 'PersArea' (1110), 'Dept of Personnel', 'EEGroup' (0), 'Permanent', 'PSubarea' (0001), 'Non Represented', 'EESubgroup' (01), 'Monthly(M) OT Exem...', 'Status' (Active), 'Start' (06/04/2006), and 'To' (12/31/9999). Below these fields is a section titled 'Additional Personal Data' which includes 'Ethnic origin' (Black), 'Ethnicity(New)' (Not Hispanic/Latino), a 'Race Data' section with a list of race categories (White, Black, American Indian/Alaskan Native, Asian, Native Hawaiian/PI) where 'Black' is selected, 'Military status' (Sep/Retired Vet < \$500), and a checkbox for 'Exempt from EEO'. At the bottom, there are two sections: 'Veteran Status' with checkboxes for 'Special disabled veteran', 'Vietnam-era veteran', 'Other veteran', 'Newly separated veteran' (selected), and 'Non-veteran'; and 'Disability' with a checkbox for 'Disability', 'Disability Date', and 'Date Learned'.

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 To 12/31/9999

Additional Personal Data

Ethnic origin Black

Ethnicity(New) Not Hispanic/Latino

Race Data

☒ Race Category

☐ White

☒ Black

☐ American Indian/Alaskan Native

☐ Asian

☐ Native Hawaiian/PI

Military status Sep/Retired Vet < \$500

☐ Exempt from EEO

Veteran Status

☐ Special disabled veteran

☐ Vietnam-era veteran

☐ Other veteran

☒ Newly separated veteran

☐ Non-veteran

Disability

☐ Disability

Disability Date

Date Learned

47. Click  (Save) to save.

Create Military Service

Create Military Service (0081)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 To 12/31/9999

Military/non-military service

Service type



This infotype will only appear if a Military status was chosen on the *Additional Personal Data* infotype.



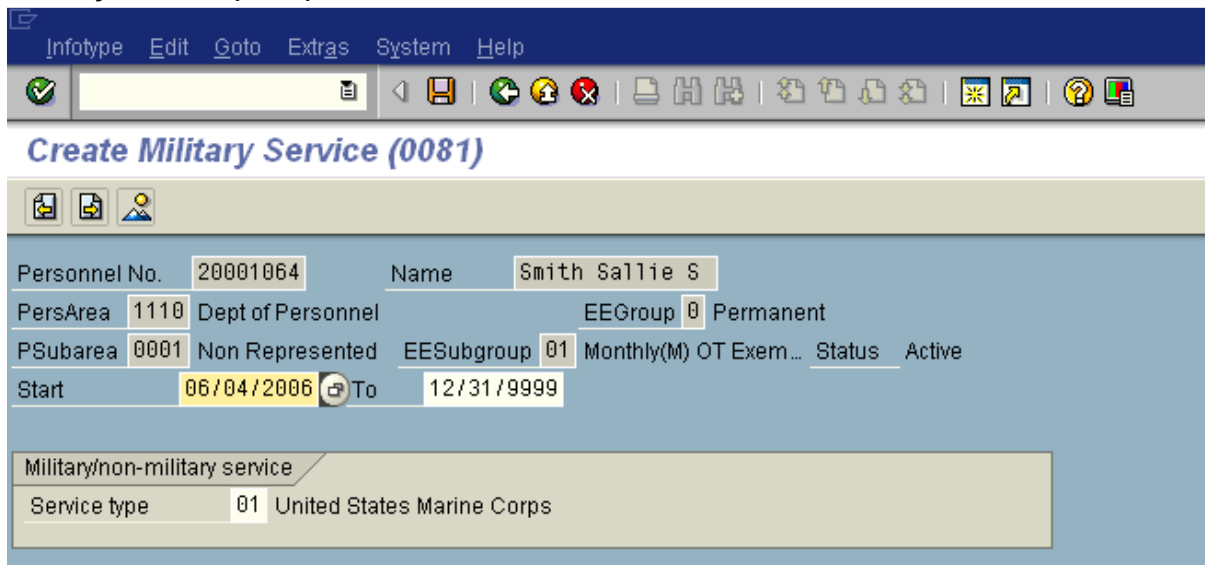
Do not save this infotype if the employee **has not** served in the Military, click (Next Record) or (Cancel) to move to the *Basic Pay* Infotype (0008) [Step 54](#).

48. Complete the following field:

Field Name	R/O/C	Description
Service type	R	This defines what type of service a state employee is performing (i.e. seasonal, temporary, in-training, etc.). Example: 01

49. Click (Enter) to validate the information.

Military Service (0081)



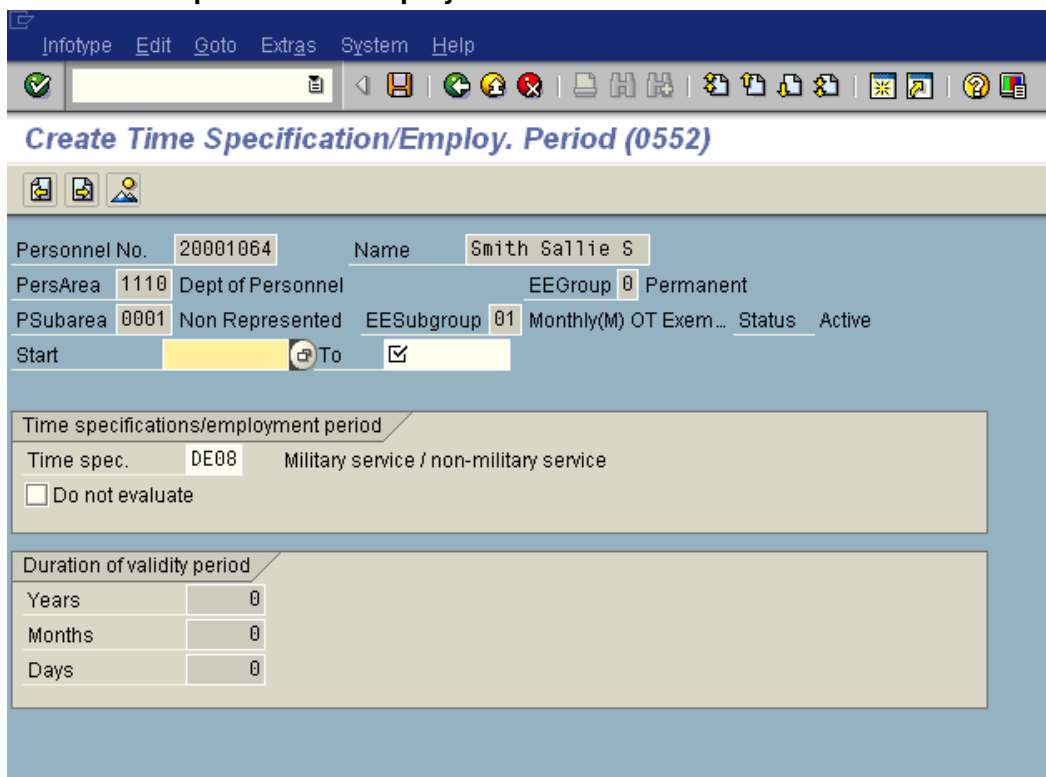
The screenshot shows the SAP 'Create Military Service (0081)' form. The menu bar includes Infotype, Edit, Goto, Extras, System, and Help. The toolbar contains various icons for navigation and actions. The form fields are as follows:

Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Active
Start	06/04/2006	To	12/31/9999

Below the main fields, there is a section for 'Military/non-military service' with a tabbed interface. The 'Service type' is set to '01 United States Marine Corps'.

50. Click  (Save) to save.

Create Time Specification/Employ. Period



The screenshot shows the SAP 'Create Time Specification/Employ. Period (0552)' form. The menu bar and toolbar are identical to the previous form. The form fields are as follows:

Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Active
Start		To	<input checked="" type="checkbox"/>

Below the main fields, there is a section for 'Time specifications/employment period' with a tabbed interface. The 'Time spec.' is set to 'DE08 Military service / non-military service'. There is a checkbox for 'Do not evaluate' which is currently unchecked.


Below that, there is a section for 'Duration of validity period' with input fields for Years, Months, and Days, all set to 0.

51. Complete the following fields:

Field Name	R/O/C	Description
Start	R	The start date the employee's Military Service. Example: 01/03/2000
To	R	The end date of the employee's Military Service. Example: 7/11/2005



You would get the Start and To date from the employee's DD214 paperwork.

52. Click  (Enter) to validate the information.

Time Specification/Employ. Period (0552)

Create Time Specification/Employ. Period (0552)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 01/03/2000 To 07/11/2005

Time specifications/employment period

Time spec. DE08 Military service / non-military service

☐ Do not evaluate

Duration of validity period

Years 5

Months 6

Days 9

53. Click  (Save) to save.

Create Basic Pay (0008)

Salary amount Payments and deductions

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999

Subtype 0 Basic contract

Pay scale

Reason	<input checked="" type="checkbox"/>	Capacity util. level	100.00
PS type	01 WFSE	Work hours/period	87.00 Semi-monthly
PS area	01 Standard Progression	Next increase	
PS group	42 Level A	Annual salary	31,284.00 USD


Wage Type Long Text	O..Amount	Curr...	I...	A.	Number/unit	Unit
1003 Pay Period Salary	1,303.50	USD	I	<input checked="" type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		


IV 06/13/2006 - 12/31/9999 1,303.50 USD

Field Name	R/O/C	Description
Reason	R	<p>This is a specific reason for performing an action or maintaining an infotype.</p> <p>Example: 19</p>

Title: New Hire Action
Processes :
Sub-Processes :


HRMS Training Documents

Field Name	R/O/C	Description
Next Increase	O	<p>The date of the employee's next pay increase.</p> <p align="center"></p> <p>If you leave the date blank, the employee will not receive a pay increase.</p> <p>Example: 01/25/05</p>



55. Click  (Enter) to validate the information.

Basic Pay (0008)

Infotype Edit Goto Wage types Extras System Help



Create Basic Pay (0008)

 Salary amount
 Payments and deductions

Personnel No. 20001064 Name Smith Sallie S
PersArea 1110 Dept of Personnel EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
Start 06/04/2006 to 12/31/9999

Subtype 0 Basic contract
Pay scale
Reason 01 Periodic Increment Capacity util. level 100.00
PS type 01 WFSE Work hours/period 87.00 Semi-monthly
PS area 01 Standard Progression Next increase 12/04/2006
PS group 42 Level A Annual salary 31,284.00 USD

Wa...	Wage Type Long Text	O..	Amount	Curr...	I...	A..	Number/unit	Unit
1003	Pay Period Salary		1,303.50	USD	I	<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

IV 06/13/2006 - 12/31/9999
1,303.50 USD

State of Washington HRMS


File name:
NEWHIRE_ACTION.DOC
Reference Number: 22

Version: SME Approved Script
Last Modified: 9/7/2006 9:12:00 AM

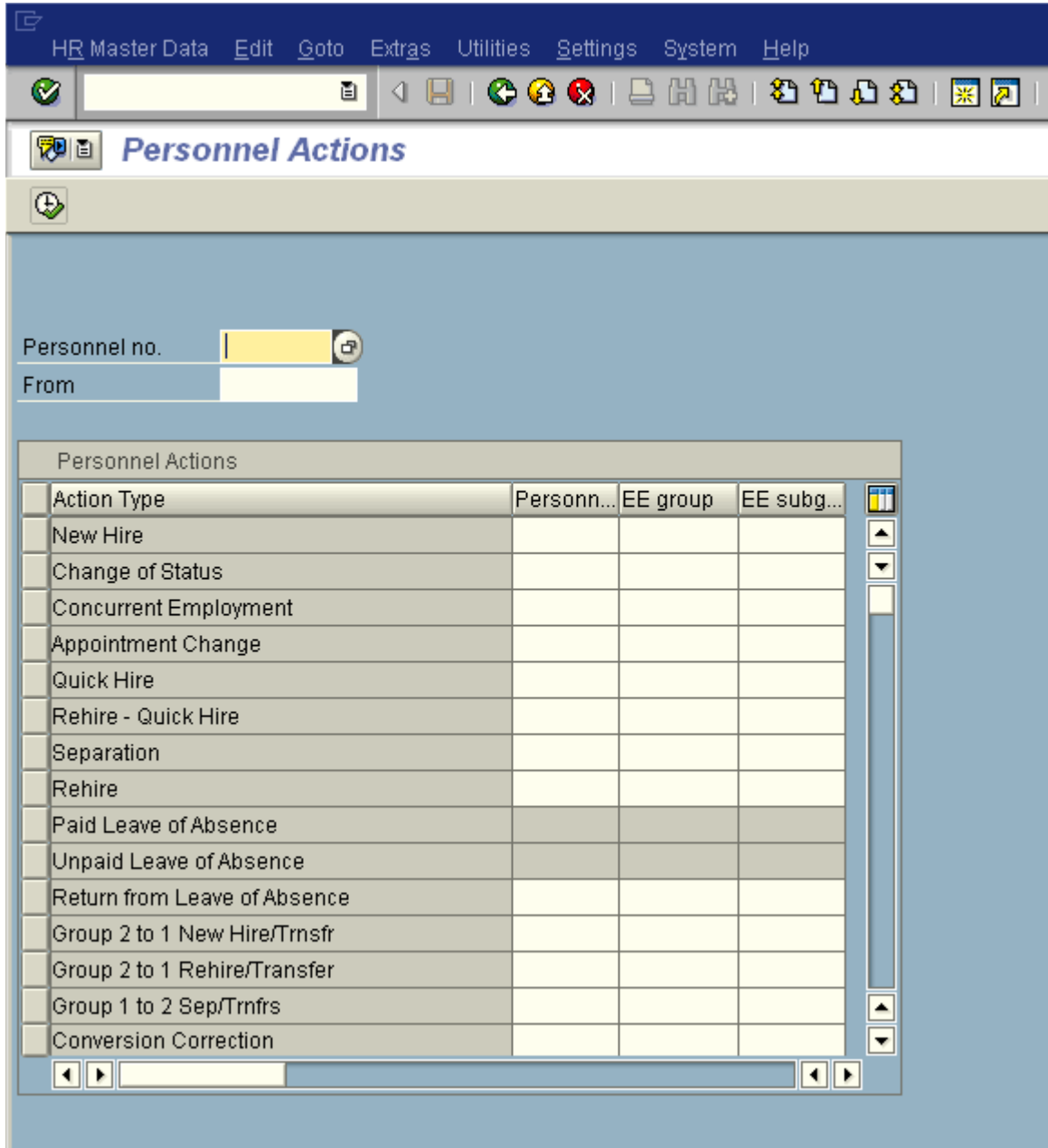
SAP Parent
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56. Click  (Save) to save.



For the **Personnel Administration Processor**, this will mark the end of the New Hire action. After saving, click  to exit the action and transfer the New Hire Information Packet to the **Payroll Processor** who will complete the action.

Personnel Actions





Personnel no. 


From

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Tnstr			
Group 2 to 1 Rehire/Transfer			
Group 1 to 2 Sep/Tnfrs			
Conversion Correction			

57. Enter the employee's personnel number.



Payroll Processor –Do not put a “From” date in the field prior to executing the transaction. If you entered a “From” date click  (Back) and delete the date and then click  (Execute).

58. Click  (Enter) to validate the information.

Personnel Actions


HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel Actions

Find by
 Person
 Collective search help
 Search term
 Free search

Personnel no. 20001064
 Name Smith Sallie S
 PersArea 1110 Dept of Personnel EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
 From

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Tnstr			
Group 2 to 1 Rehire/Transfer			
Group 1 to 2 Sep/Tnfrs			
Conversion Correction			
Non-Payroll EE New Hire			

59. Click  (Execute) to start the transaction.

Actions (0000)

Change Actions (0000)

Execute info group Change info group

Pers.No. 20001064
 Name Smith Sallie S
 PersArea 1110 Dept of Personnel EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
 Start 06/04/2006 to 12/31/9999 Chng 06/13/2006 CHYLYNNH

Personnel action
 Action Type New Hire
 Reason for Action 02 Probationary Appointment


Status
 Employment Active

Organizational assignment
 Position 60004597 HR Consult
 Personnel area 1110 Dept of Personnel
 Employee group 0 Permanent
 Employee subgroup 01 Monthly(M) OT Exempt

Additional actions



Start Date	Act	Action type	ActR	Reason for acti
06/04/2006	U0	New Hire	02	Probationary Appointment

60. Click Execute info group.
61. An information pop up box will appear informing you that "This entry will delete a record." Click (Enter) to continue.

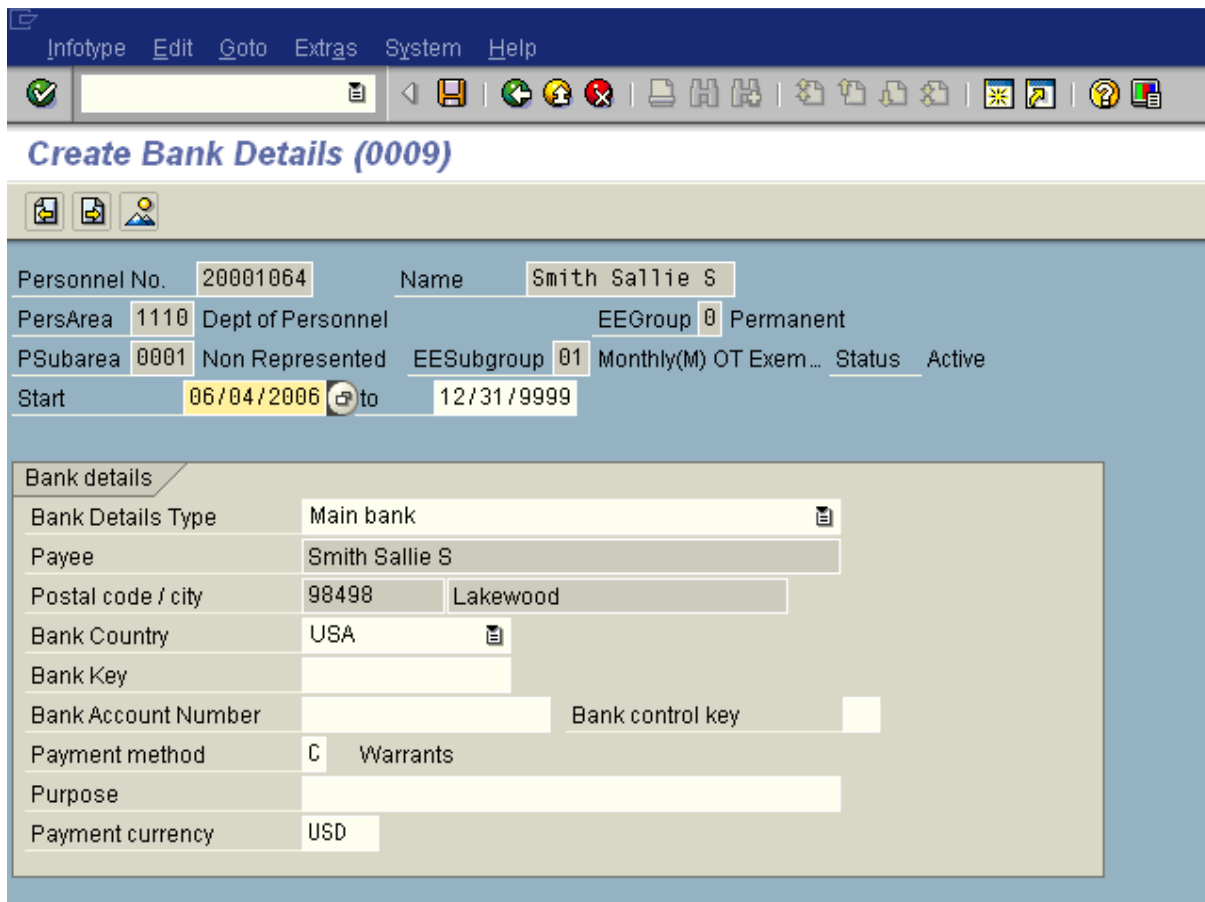
62. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click .



The **Personnel Processor** has already saved this infotype so it is ok to continue.

63. Click  (Next Record) until you reach Subtypes for Infotype Education click the **X** in the right hand corner of the box to by-pass this infotype. Continue to click  (Next Record) until reach *Create Bank Details* Infotype (0009).

Create Bank Details







Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Active
Start	06/04/2006	to	12/31/9999


Bank details	
Bank Details Type	Main bank
Payee	Smith Sallie S
Postal code / city	98498 Lakewood
Bank Country	USA
Bank Key	
Bank Account Number	Bank control key
Payment method	C Warrants
Purpose	
Payment currency	USD



If the employee is to receive a paper check, proceed to Step 56. If the employee would like their pay check deposited in a bank of their choice, complete the field listed below.

64. As required, complete/review the following fields:

Field Name	R/O/C	Description
Bank Key	C	<p>The bank's routing number.</p> <p> Leave blank for a Warrants payment method. Example: 12345678</p>
Bank Account Number	C	<p>The employee's bank account number.</p> <p> Leave blank for a Warrants payment method. Example: 123456789</p>
Bank Control Key	C	<p>The type of bank account - for example, savings or checking.</p> <p> Enter 01 for Checking or 02 for Savings. Do not leave this field blank. Example: 02</p>
Payment method	R	<p>This is the manner in which an employee is compensated, either by warrant or direct deposit.</p> <p> For direct deposit, use D. Example: C</p>

65. Click  (Enter) to validate the information.



You must save the Bank Details infotype to accept the default of a warrant. If you do not save this infotype, the employee will red line on payroll reports and will not process through payroll until the Bank Details infotype is created and saved.

66. Click  (Save) to save.

Create Recurring Payments/Deductions

Create Recurring Payments/Deductions (0014)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999

Recurring Payments/Deductions

Wage type ☒

Amount USD

Number/unit

Assignment number

Reason for Change

Payment dates

Payment model



If no information has been provided for recurring payments or deductions, skip this infotype by clicking (Next record).


67. Complete the following fields:

Field Name	R/O/C	Description
Wage type	R	This is an object in Payroll and Personnel Administration which stores amounts or time units that are used to calculate pay and deductions, store results, and determine statistics. It separates amounts and time units for various business processes. It enables the system to process amounts and time units in different ways during the payroll run. Example: 2703

Title: New Hire Action
Processes :
Sub-Processes :


HRMS Training Documents

Field Name	R/O/C	Description
Amount	R	The total dollar value of a wage type. (Not Needed when Wage type is a percentage). Example: 6.00
Payment Model	C	The time pattern in which deductions are withdrawn and payments made. Example: WA01

68. Click  (Enter) to validate the information.

Recurring Payments (0014)

Infotype Edit Goto Extras System Help



Create Recurring Payments/Deductions (0014)

Personnel No. 20001064
PersArea 1110
PSubarea 0001
Start 06/04/2006 to 12/31/9999

Name Smith Sallie S
Dept of Personnel EEGroup 0 Permanent
Non Represented EESubgroup 01 Monthly(M) OT Exem...
Status Active

Recurring Payments/Deductions
Wage type 2730 **Dept of General ADM park**
Amount A 6.00 **USD** **Monthly**
Number/unit
Assignment number
Reason for Change

Payment dates
Payment model WA01 **Every Pay Period - Half Amount**



If the employee has recurring payments /deductions, go to **PA30** and follow the procedures Create a Recurring Payment or Create Recurring Deduction after performing the new hire action.

69. Click  (Save) to save.

State of Washington HRMS

File name:
 NEWHIRE_ACTION.DOC
Reference Number: 22

Version: SME Approved Script
Last Modified: 9/7/2006 9:12:00 AM

SAP Parent
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Create Unemployment State

Create Unemployment State (0209)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999


Unemployment data

Tax authority ☒

Worksite ☒

70. Complete the following fields:

Field Name	R/O/C	Description
Tax authority	R	The tax authority for employment. Example: WA
Worksite	R	The county of employment. Example: 34

71. Click  (Enter) to validate the information.

Unemployment State (0209)

The screenshot shows the 'Create Unemployment State (0209)' form in SAP. The form has a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar with various icons. The main data area contains the following fields:

Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Active
Start	06/04/2006	to	12/31/9999

Below the main data area is a section titled 'Unemployment data' with the following fields:

Tax authority	WA	Washington
Worksite	34	Thurston County

72. Click  (Save) to save.

Create Withholding Info W4/W5 US

Create Withholding Info W4/W5 US (0210)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999

Status

Tax authority FED Federal Tax level A Federal

Filing Status ☒

Exemptions

Allowances

Tax Exempt Indicator ☐ ☐ IRS mandates

Withholding adjustments

Add.withholding USD

Default formula 1 PERCENTAGE M... Alternative formula


W-5 filing status


EIC status

Overrides (from Infotype 0234)

From date	End Date	Supplemental met...	Tax override	Em...

73. Complete the following fields:

Field Name	R/O/C	Description
Filing Status	R	The status elected by the employee for federal tax withholding. Example: 01
Allowances	R	The number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck. Example: 01
Add.withholding	O	An amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status. Example: 100.00
Tax exempt indicator	C	<p>The indicator which determines if the employee is exempt from taxation.</p> <div style="display: flex; align-items: center;">  <div> <p>Using Tax Exempt indicator Y will make the wages exempt from taxation and not reportable to the IRS.</p> <p>Using Tax Exempt indicator R will make the wages exempt from taxation and earnings are reported to the IRS.</p> </div> </div> <p>Example: Y</p>

74. Click  (Enter) to validate the information.

Create Withholding Info W4/W5 US

Create Withholding Info W4/W5 US (0210)

Personnel No. 20001064 Name Smith Sallie S
PersArea 1110 Dept of Personnel EESubgroup 01 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
Start 06/04/2006 to 12/31/9999

Status
Tax authority FED Federal Tax level A Federal
Filing Status 01 Single

Exemptions
Allowances 1
Tax Exempt Indicator ☐ IRS mandates

Withholding adjustments
Add withholding 100.00 USD
Default formula 1 PERCENTAGE M... Alternative formula

W-5 filing status
EIC status

Overrides (from Infotype 0234)

From date	End Date	Supplemental met...	Tax override	Em...

75. Click  (Save) to save.

Create Add. Withh. Info. US

Create Add. Withh. Info. US (0234)

Personnel No. 20001064 Name Smith Sallie S

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 06/04/2006 to 12/31/9999

Overrides

Tax authority FED Federal Tax level A Federal

Supplemental method

Override amount

Override percentage ☐ No Tax


Empl.override group

Common Paymaster

☐ Common Paymaster

76. Complete the following fields:

Field Name	R/O/C	Description
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. Example: 0034

77. Click  (Enter) to validate the information.

Create Add. Withh. Info. US

Personnel No. 20001064 **Name** Smith Sallie S

PersArea 1110 **Dept of Personnel** **EEGroup** 0 **Permanent**

PSubarea 0001 **Non Represented** **EESubgroup** 01 **Monthly(M) OT Exem...** **Status** Active

Start 06/04/2006 to 12/31/9999

Overrides

Tax authority FED **Federal** **Tax level** A **Federal**

Supplemental method

Override amount

Override percentage ☐ No Tax


Empl.override group 0034 1100-4902 Admin & clerical

Common Paymaster

☐ Common Paymaster

78. Click  (Save) to save.



For the **Payroll Processor**, this will mark the end of the New Hire action. After saving, click  to exit the action and transfer the New Hire Information Packet to the **Benefits Processor** who will complete the action.

Personnel Actions

Personnel no.


From

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Tnstr			
Group 2 to 1 Rehire/Transfer			
Group 1 to 2 Sep/Tnfrs			
Conversion Correction			

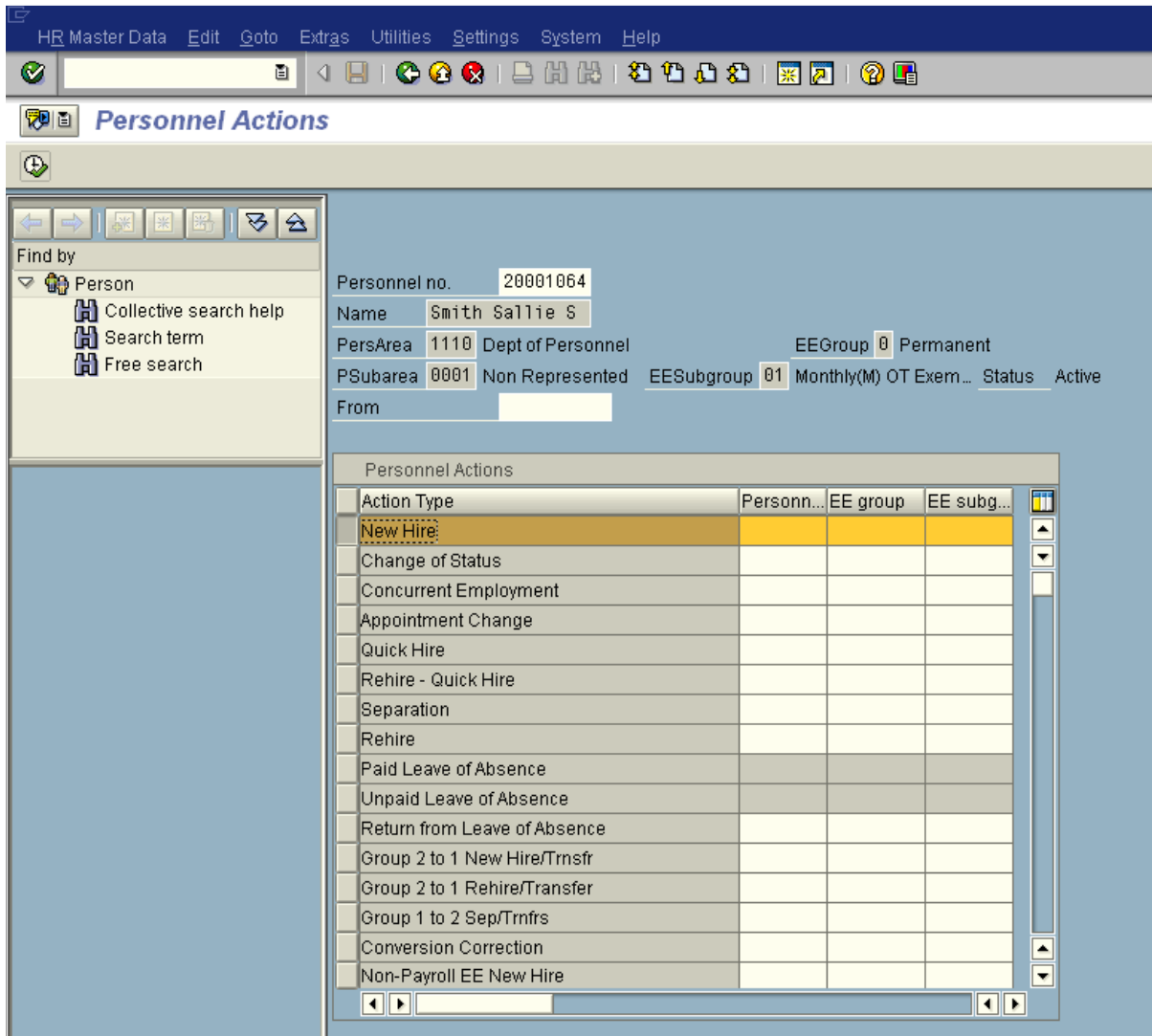
79. Enter the employee's personnel number.



Benefits Processor –Do not put a “From” date in the field prior to executing the transaction. If you entered a “From” date click (Back) and delete the date and then click (Execute).

80. Click  (Enter) to validate the information.

Personnel Actions




HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel Actions

Find by
 Person
 Collective search help
 Search term
 Free search

Personnel no. 20001064
 Name Smith Sallie S
 PersArea 1110 Dept of Personnel
 EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
 From

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Trnsfr			
Group 2 to 1 Rehire/Transfer			
Group 1 to 2 Sep/Trnfrs			
Conversion Correction			
Non-Payroll EE New Hire			

81. Click  (Execute) to start the transaction.

Actions (0000)

Change Actions (0000)

Execute info group Change info group

Pers.No. 20001064
 Name Smith Sallie S
 PersArea 1110 Dept of Personnel EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
 Start 06/04/2006 to 12/31/9999 Chng 06/13/2006 CHYLYNNH

Personnel action
 Action Type New Hire
 Reason for Action 02 Probationary Appointment


Status
 Employment Active

Organizational assignment
 Position 60004597 HR Consult
 Personnel area 1110 Dept of Personnel
 Employee group 0 Permanent
 Employee subgroup 01 Monthly(M) OT Exempt

Additional actions



Start Date	Act	Action type	ActR	Reason for acti
06/04/2006	U0	New Hire	02	Probationary Appointment

82. Click Execute info group.
83. An information pop up box will appear informing you that "This entry will delete a record." Click (Enter) to continue.

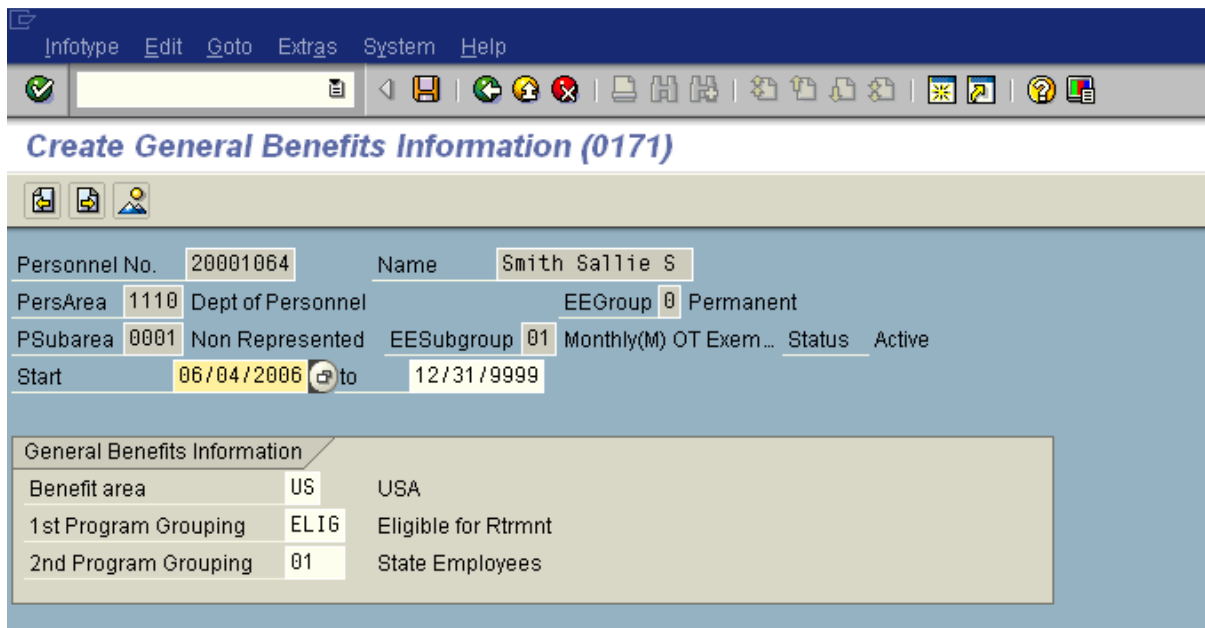
84. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click .



The **Personnel Processor** has already saved this infotype so it is ok to continue.

85. Click  (Next Record) until you reach Subtypes for Infotype Education click the **X** in the right hand corner of the box to by-pass this infotype. Continue to click  (Next Record) until reach *Create General Benefits Information Infotype (0171)*.

Create General Benefits Information



Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Active
Start	06/04/2006	to	12/31/9999

General Benefits Information		
Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees




The **1st Program Grouping** defaults in as eligible. To verify that the position is eligible use transaction code **PO13D**, click the gray box to the left of *Acct Assignment Features* infotype. If there is an X in the box next to retirement eligible then the position is retirement eligible. If the box is blank the position is not retirement eligible.

The value in the **2nd Program Grouping** field defaults from appointment information in the *Organizational Assignment* infotype (0001).

You will have to change the **2nd Program Grouping** field if:

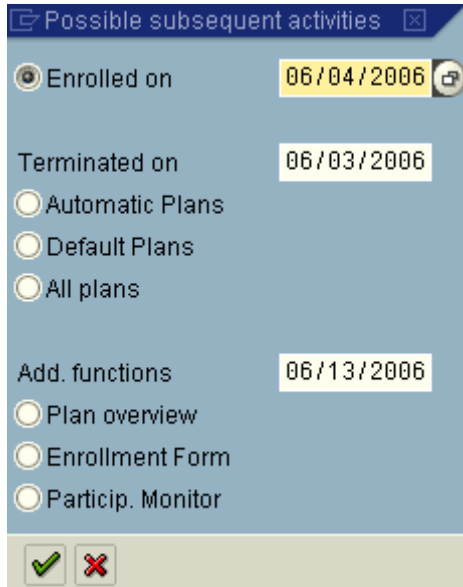
- An employee chooses a different plan.
- The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time.
- An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position.

For a list of valid type codes for each retirement system, see [The Employer Handbook - Type Codes](#).


86. Click  (Enter) to validate the information.

87. Click  (Save) to save.

Possible subsequent activities



Possible subsequent activities

☒ Enrolled on 06/04/2006 

Terminated on 06/03/2006

☐ Automatic Plans

☐ Default Plans



☐ All plans

Add. functions 06/13/2006

☐ Plan overview

☐ Enrollment Form

☐ Particip. Monitor

88. Click  to accept.

Enrollment

The screenshot shows the SAP HRMS Enrollment screen. The title bar includes 'Enrollment', 'Edit', 'Goto', 'System', and 'Help'. The menu bar contains 'Enrollment', 'Edit', 'Goto', 'System', and 'Help'. The toolbar includes various icons for file operations and system functions. The main area is divided into several sections:

- Direct selection / Selection set:** Contains input fields for 'Personnel no.' and 'ID number', and a 'Select' button.
- Enroll:** Contains a 'Name' field with 'Smith Sallie S', an 'on' date field with '06/04/2006', and an 'Overview' button.
- Offer selection:** Contains buttons for 'Get offer', 'Print form', 'General Notice', and 'Error list'. Below these is a table with two columns: 'Possible offers' and 'Enrollment period'.
- Pers.No. / Name:** A table listing personnel with one entry: '20001064' and 'Smith Sallie S'.
- Offer:** A large empty area for displaying offer details.

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Pers.No.	Name
20001064	Smith Sallie S

89. Click  Get offer .

Enrollment

The screenshot shows the HRMS Enrollment interface. On the left, there are input fields for 'Personnel no.' and 'ID number', and a 'Select' button. Below these is a list of personnel with columns 'Pers. No.' and 'Name'. The list shows two entries: '20001064 Smith Sallie S' and '20001065 test'. The main area is titled 'Enrollment' and contains several sections. The 'Enroll' section shows 'Name: Smith Sallie S' and 'on: 06/04/2006'. The 'Offer selection' section has buttons for 'Get offer', 'Print form', 'General Notice', and 'Error list'. It displays a table of possible offers with columns 'Possible offers' and 'Enrollment period'. The table shows 'Retirement Enrollmnt' with an enrollment period of '01/01/1800 - 12/31/9999'. The 'Retirement Enrollmnt' section has buttons for 'Enroll', 'Costs', 'Undo selection', and 'Error list'. It displays a table with columns 'Status', 'Validity period', and 'Activity'. The table shows a list of plans for '401(a)' with various PERS 2 and PERS 3 options, all with a validity period of '06/04/2006 - 12/31/9999'.

90. Click the appropriate Savings Plan.



By using the **PA40** transaction code, HRMS will identify all plans that the employee is eligible to participate in.



For a new PERS 2 employee, upon completion of the enrollment processor, immediately update the Plan choice code on the *Savings Plan* (0169) infotype to place the employee on the 70-day/90-day default report. See OLQR procedure, [Retirement Plan Choice Code 90 day period \(New Hire\)](#).

Maintain Savings Plan

Maintain Savings Plan

Pers.No. 20001064 Smith Sallie S

Plan PERS 2

Start 06/04/2006 - 12/31/9999

☐ Stop participation in period

Contribution regular

Pre-tax contribution Semi-monthly

Amount 0.00 USD ☐ Pre-Tax Rollove

Percentage 2.25

Units 0 X 0.00 USD

Post-tax contribution Semi-monthly

Amount 0.00 USD ☐ Start Pst-Tax I

Percentage 0.00

Units 0 X 0.00 USD

Accept




State of Washington HRMS

File name:
NEWHIRE_ACTION.DOC
Reference Number: 22

Version: SME Approved Script
Last Modified: 9/7/2006 9:12:00 AM

SAP Parent
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91. Complete the following field:

Field Name	R/O/C	Description
Percentage	R	<p>This is a field used to store a percentage amount for the retirement deduction.</p> <p> Do not leave the percentage field blank or HRMS will not take any deductions for retirement.</p> <p> If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an  Error message in the status bar telling you what the correct contribution percentage is for the selected plan.</p> <p>Example: 2.25</p>

92. Click .

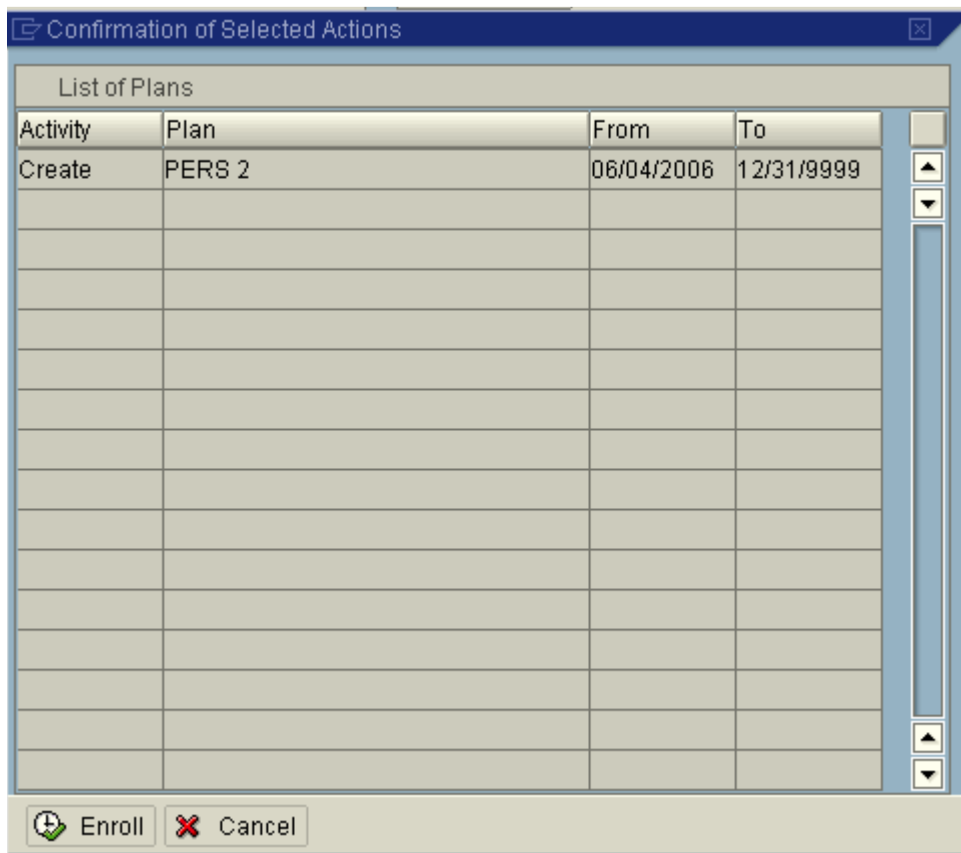
Enrollment

The screenshot shows the HRMS Enrollment application. The top menu bar includes 'Enrollment', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main window is titled 'Enrollment' and contains several sections:

- Direct selection / Selection set:** Fields for 'Personnel no.' and 'ID number', and a 'Select' button.
- Enroll:** A section with 'Name' (Smith Sallie S) and 'on' (06/04/2006) fields, and an 'Overview' button.
- Offer selection:** A section with buttons for 'Get offer', 'Print form', 'General Notice', and 'Error list'. Below these is a table with two columns: 'Possible offers' and 'Enrollment period'. The table contains one row: 'Retirement Enrollmnt' with the period '01/01/1800 - 12/31/9999'.
- Retirement Enrollmnt:** A section with buttons for 'Enroll', 'Costs', 'Undo selection', and 'Error list'. Below these is a table with three columns: 'Status', 'Validity period', and 'Activity'. The table contains a list of pension plans under the heading '401(a)'. The first row is 'PERS 2' with a validity period of '06/04/2006 - 12/31/9999' and a green checkmark in the 'Activity' column. The following rows are 'PERS 3 - Option 0' and 'PERS 3 - Rate A - Self' through 'PERS 3 - Rate F - WSIB', all with the same validity period and no checkmarks.

93. Click  **Enroll**.

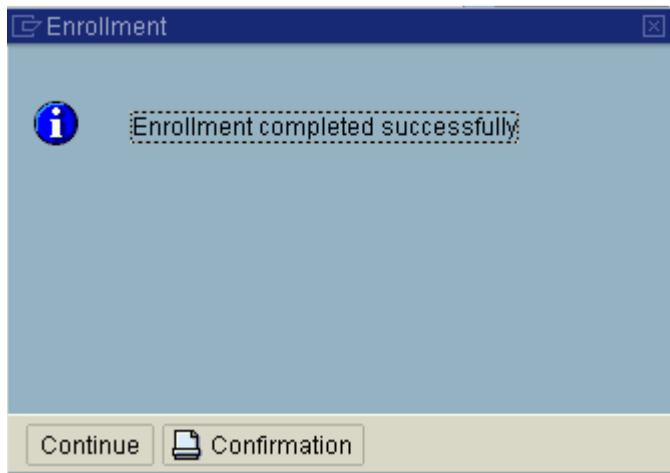
Confirmation of Selected Actions




Activity	Plan	From	To
Create	PERS 2	06/04/2006	12/31/9999

94. Click  Enroll .

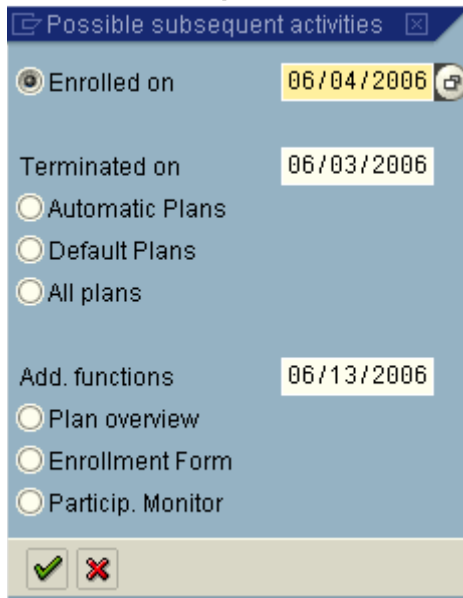
Enrollment



95. Click  to continue or click  to print confirmation.

96. Click  to return to the previous screen. The following screen displays:

Possible subsequent activities



97. Click  to cancel.

98. You have completed this transaction.

Result

You have hired a new employee into HRMS.

Comments



If the employee chooses to stay in Plan 2, see the OLQR procedure, [Retirement Plan Choice – 90-day Section Period Chose Plan 2](#)

If the employee chose Plan 3, see the OLQR procedure, [Retirement Plan Choice – 90-day Section Period Chose Plan 3](#)

One of these procedures must be completed when the employee submits their completed DRS member information form designating their choice during the 90-day choice period.

The Employee that is enrolled in Plan 2 will default to P3, Rate A - WSIB investment manager.